CONSERVATION PLAN REVIEW WORKSHEET *

Planner: ____ **Date**: _____________________

Duty Location: ____

Conservation Plan ID (Client Name): ____

Land Uses(s) Addressed in Plan: ❒ Irrig. Crop ❒ Nonirrigated Crop ❒ Range ❒ Wildlife ❒ Pasture/Hay ❒ Forest ❒ Urban

Recommended for Approval: ____ **Yes** _____ **No (If "No," state reasons below.)**

Comments: ____

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Reviewer: ____ **Date**: __________
(Name, Title)

Approved: ______________________________, State Resource Conservationist **Date**: __________
(Name)

* Note: This worksheet is for the reviewer's use in evaluating: (1) the adequacy of a conservation plan delivered to a client; (2) the official case files support documentation; and (3) the process of plan delivery during the site visit.

EVALUATION OF OVERALL PLANNING PROCESS (STEPS 1-8 OF THE 9-STEP PLANNING PROCESS)

PHASE 1 - COLLECTION AND ANALYSIS (*Understanding the Problems and Opportunities*)

Step 1 – Identify Problems and Opportunities

Standard: Are client's resource problems, opportunities, and concerns adequately identified and documented?
☐ Yes ☐ No
Comments and necessary follow-up:

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Step 2 – Determine Objectives

Standard: Are client's objectives clearly stated and documented?
☐ Yes ☐ No
Comments and necessary follow-up: ____

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RESET FORM

Step 3 – Inventory Resources

Standard: Are sufficient data and information gathered to analyze and understand the natural resource conditions in the planning area? Are all resources and their considerations addressed?

☐ Yes ☐ No

Comments and necessary follow-up: ______________________________

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Step 4 – Analyze Resource Data

Standard: Are comparisons between existing (benchmark) resource conditions and potential conditions displayed in easily understood formats? Are causes of resource problems identified and environmental evaluation(s) documented?

☐ Yes ☐ No

Comments and necessary follow-up: ______________________________

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PHASE 2 – DECISION SUPPORT (*Understanding the Solutions*)

Step 5 – Formulate Alternatives

Standard: Are alternative treatments developed to meet Quality Criteria and objectives of the client?

☐ Yes ☐ No

Comments and necessary follow-up: ______________________________

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Step 6 – Evaluate Alternatives

Standard: Are effects of each alternative evaluated and the impacts (on- and off-site) described?

☐ Yes ☐ No

Comments and necessary follow-up: ______________________________

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Step 7 – Make Decisions

Standard: Is an RMS selected based on the client's clear understanding of the impacts of each alternative and recorded in the client's plan? If the client is not able to commit to the RMS level of treatment, is an RMS level alternative included in the plan?

☐ Yes ☐ No

Comments and necessary follow-up: ______________________________

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PHASE 2 – APPLICATION AND EVALUATION (*Understanding the Results*)

Step 8 – Implement the Plan

Standard: Does the client have adequate information, understanding, and the financial resources to implement, operate, and maintain planned conservation systems?

☐ Yes ☐ No

Comments and necessary follow-up: ______________________________

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THE CONSERVATION PLAN

Does the conservation plan delivered to the client include the following items? If not, explain.
(Note: The list is not intended to be comprehensive. Some items may not be needed in a plan. Under the current limitations of electronic tools, some items may be impractical to include in a plan.

(Place a "✓" on items included in the plan.)

____ A folder or binder that organizes and protects the assembled information

____ A signed Conservation District Cooperator Agreement form (if applicable)

____ Conservation Plan Map

- ____ Information conveyed in a "title block" or elsewhere on the map:
  - ____ "Conservation Plan Map"
  - ____ "Prepared with assistance from USDA Natural Resources Conservation Service"
  - ____ Name of the Conservation District, county, and state
  - ____ Scale of map
  - ____ Parcel identification information (e.g., Tract #, section/township/range)
  - ____ Date plan prepared
  - ____ North arrow
- ____ Map clearly depicts:
  - ____ Boundary lines of the planning unit
  - ____ Field boundaries
  - ____ HEL Fields (if applicable)
  - ____ Land use designation and acres for each field (incl. rangeland/ESD delineations)
  - ____ Appropriate map symbols and a map symbol legend (on map or as an attachment)
  - ____ Contract Item Numbers (CINs), as appropriate
  - ____ Utilities and/or easements

____ Soils Map

- ____ Information conveyed in a "title block" or elsewhere on the map:
  - ____ "Soils Map"
  - ____ "Prepared with assistance from USDA Natural Resources Conservation Service"
  - ____ Name of the Conservation District, county, and state
  - ____ Scale of map
  - ____ ID information (e.g., soil survey sheet no.; section/township/range)
  - ____ North arrow
- ____ Map clearly depicts:
  - ____ Boundary lines of the soil map units
  - ____ Soil map unit symbols
  - ____ Appropriate soil map symbols and a map symbol legend (on map or as an attachment)

____ Interpretive information

Examples:

- ____ Soils descriptions meaningful to client (technical or non-technical)
- ____ Soil interpretations (Land Capability Class [LCC], suitability groupings for relevant land uses, etc.)

- ____ Range/Ecological Site/Forage Suitability Group/ etc. descriptions
- ____ Resource assessments developed with or for the client (e.g., vegetative inventories, forage balance worksheets, waste/nutrient management worksheets, erosion calculations, residue management worksheets, irrigation water management assessments, cost estimates)
- ____ Job sheets and other pertinent information designed for client's use
- ____ Maps, sketches, designs, etc. that may be helpful to the client during implementation of the plan
- ____ Impact assessment: Conservation Practice Physical Effects (CPPE) worksheets, Environmental Effects worksheets, etc.

____ Record of Client's Decisions

Note: "Toolbox" generates a document entitled "Conservation Plan." It may be advisable to edit the form to reflect that the contents are actually a "record of client decisions."

Includes:

- ____ A land use summary table, if applicable, listing CMUs, Tracts, fields, land use, acreage
- ____ An implementation schedule showing conservation practice name, a brief description of the practice, and practice units
- ____ Operation and maintenance commitments (If extensive, this might be included in a separate document.)
- ____ Signature block for client (and Conservation District, if necessary)
- ____ Signature block for Certified Conservation Planner (CCP) with Stamp
- ____ USDA EO/Nondiscrimination Statement

____ Other Information

May include:

- ____ Copies of correspondence
- ____ CPA-027
- ____ CPA-026
- ____ CPA-026A
- ____ Copies of conservation practice standards (or reference to Sec. IV FOTG)
- ____ Conservation practice specifications
- ____ RMS level alternatives (required in progressive planning situations)
- ____ CPPE worksheets for practices (May refer to samples developed and filed in FOTG.)
- ____ Environmental Effects worksheets for alternatives
- ____ Reference information (e.g., local or regional environmental assessments, watershed plans, CD Long Range Program, economic cost information, etc)

____ Is the plan professional in appearance? (i.e., neat, proper grammar, spelling, clear and appealing graphics/sketches, etc.)

____ Is the plan format easy to follow and logically organized?

____ Is the plan prepared in language readily understood by client?

____ Does the plan adequately address:

- ____ The client's problems, opportunities, and objectives? ____ Short- and long-term?
- ____ Economic, social, and ecological considerations? ____ Short- and long-term?
- ____ Social and ecological values protected by law or Executive Order?

NRCS CASE FILE

Does the official NRCS case file contain the following items? If not, explain. (Note: Some of the documentation may be maintained in electronic form.)

____ A complete version of the plan delivered to the client (Note: To save space and time, some generic documents that were included in the client's version may simply be listed (incorporated by reference), rather than maintained in the case file. Client-specific documents such as maps, interpretive information, support documentation, forms, etc., must be maintained in the official case file.)

____ Correspondence

____ Copies of official forms (e.g., AD-1026, CPA-026, CPA-026A, CPA-027, etc.)

____ Technical Assistance Notes

____ Written record of client objectives, concerns, resource problems (typically put in TA Notes)

____ CPPE worksheets used to evaluate conservation practice alternatives (May refer to samples developed and filed in FOTG.)

____ Documentation of "Before" and "After" erosion rates

____ Documentation of Site Vulnerability Assessments

____ Environmental Effects documentation for each alternative developed (on form CPA-52)

____ Written record of discussions (Tech Notes) with client regarding development and evaluation of alternatives?

Does the documentation include evaluation of:

- ____ The client's problems, opportunities, and objectives? ____ Short- and long-term?
- ____ Economic, social, and ecological considerations? ____ Short- and long-term?
- ____ Social and ecological values protected by law or Executive Order?

____ Practice design documentation

____ Engineering notes

____ Documentation of applied practices

____ Other support documentation (Please, describe.)

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FIELD VISIT *(An evaluation of the plan delivery process.)*

Did the planner:

____ Discuss the purpose of the conservation plan?
____ Discuss the NRCS/Conservation District relationship in providing technical assistance?
____ Identify/Discuss client objectives, both short- and long-term?
____ Identify/Discuss problems and opportunities?
____ Discuss NRCS planning objectives and the purpose of RMS level planning?
____ Discuss the concept of Conservation Management Units (CMUs)?
____ Review the selected alternative and the schedule of practice application?
____ Review other alternative(s) developed, especially an RMS level alternative--if the plan is a progressive plan?
____ Discuss any job sheets or designs that may be included with the plan?

Is the client:

____ The decision-maker?
____ Satisfied with the planning process and its outcome (the plan)?
____ Committed to the decisions made and the implementation schedule?
____ More informed about his/her natural resources and their stewardship?

Summary Comments

What were the most effective parts of the planning assistance to the client?

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What, if anything, could have been done differently to improve the process?

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